



2020 Advisory Conference

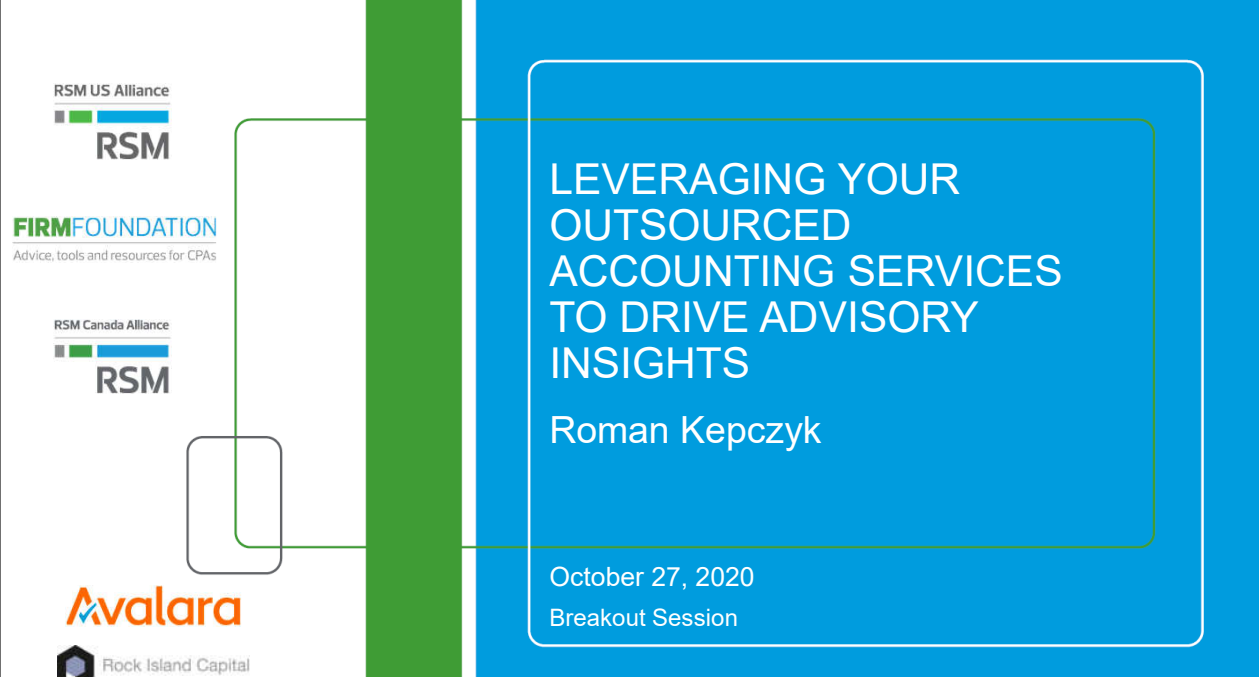
October 27–29

Converging knowledge and behaviors to deepen client relationships

RSM Canada Alliance
RSM

FIRM FOUNDATION
Advice, tools and resources for CPAs

RSM US Alliance
RSM



LEVERAGING YOUR OUTSOURCED ACCOUNTING SERVICES TO DRIVE ADVISORY INSIGHTS

Roman Kepczyk

October 27, 2020
Breakout Session

RSM US Alliance
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FIRM FOUNDATION
Advice, tools and resources for CPAs

RSM Canada Alliance
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Avalara

Rock Island Capital

Speaker



Roman H. Kepczyk, CPA.CITP, CGMA
Director of Firm Technology Strategy



Outsourced IT partner to over 400 CPA firms helping them transform by adopting today's digital tools and optimized production processes.



Top 100 Most Influential People in
 Accounting
 (14 Years)



Most Recommended Consultants
 (15 Years)



Top Thought Leader 2011-
 2020

Right Networks®



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CLIENT ACCOUNTING AND ADVISORY (CAAS) PLAYBOOK

October 27, 2020

Objectives

By the end of this course, you will be able to:

- Understand the evolution from CAS to CAAS including the trends and technologies driving advisory services
- Know what you need to advise upon your firm's technology stack and why it is critical to your firm's CAAS success
- Outline how to skill up your CAAS team and be aware of the learning resources available today



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Agenda

CAAS Playbook

- CAS + CAS = CAAS
- Understanding CAAS drivers
- Garnering an advisory mindset
- Skilling up your team
- Advising upon the tech stack

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CAS + CAS = CAAS

- Differentiating CAS from CAS?
- Nothing new....
- Small Firm vs. Big Firm CAS
- What is your firm's view?
- CAS and CAS = CAAS!

(Accounting vs. Advisory vs. Consulting)

JOURNAL OF ACCOUNTANCY

ADVERTISEMENT

FEATURE | SPECIAL TO THE JOURNAL OF ACCOUNTANCY

The XYZ Credential

An opportunity to lead the professional services industry in the 21st century.

BY JIM EMERSON
September 30, 2001

In response to this opportunity, the American Institute of Certified Public Accountants has launched its XYZ credential initiative. The XYZ label is simply the placeholder name for a yet-to-be selected title. A previous name, "Cognitor," had been used; however, the AICPA membership did not find the "Cognitor" label appealing and it was dropped. Once the credential is officially launched, a new global professional body, separate from the AICPA, will be formed to provide the ongoing infrastructure and support for the credential. Essentially, the XYZ credential will constitute a new profession that will be different and distinct from other existing professions and will complement, not compete, with the other credentials.

AccountingWeb has learned that the American Institute of CPAs plans to propose a value-added designation called "vanguard," on behalf of the accounting profession. The announcement was made during the AICPA's State-CPA Society Interchange Conference, held in Tucson July 19-21.

Based on research and development, the new name is designed to talk to issues about thought and knowledge, and to enlarge the CPA's skill set. It reflects that the knowledge owned by a CPA could be more useful and important than mere data itself.

AICPA plans to present the new designation at its full Council meetings.

The new name follows the lead of other radical changes occurring at AICPA, such as the proposed, global "XYZ" designation. The new designation is designed to be effective on an international level to signify expert abilities in financial-oriented knowledge, and already has the support of many other CPA-related organizations. Sources say that activities like the "vanguard" and "XYZ" designations are a direct result of the recent CPA Vision.

Client Accounting AND Advisory Services



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Understanding CAAS Drivers

- Business is great-why change? (2010-2019)
 - Monthly accounting, payroll, individual tax returns
 - Volume of work increasing or decreasing?
 - Firms profitability increasing or decreasing?



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Understanding CAAS Drivers

- Business is great-why change?until it's not

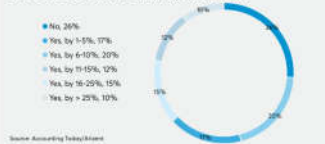
- Monthly accounting, payroll, individual tax returns
- Volume of work increasing or decreasing?
- Firms profitability increasing or decreasing?

accountingTODAY

The accounting profession and the coronavirus: The crisis in numbers

By David Hood

Do you expect your firm's revenue to decrease because of the pandemic?



Source: Accounting Today/BitMatrix

Projecting declines — for now



An Industry in Transition: Trends in Accounting

Emerging trends and the changing needs of businesses are driving accounting firms to create new strategies, move beyond traditional services and add incremental revenue streams.

55% of accountants expect traditional revenue streams to dry up in the near future

78% say they need to move beyond traditional services to survive

At the same time 57% of businesses say they are not fully utilizing all of the services and insights their accounting firm can provide



72% of Millennial and 62% of Gen X

accounting firm decision makers already offer or plan to offer HR/Talent Management consulting services — compared to just

34% of Boomers

Source: ADP accounting profession survey,

<https://www.adp.com/-/media/adp/resourcehub/pdf/adp-accounting-trends-infographic.ashx>

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Understanding CAAS Drivers

- Business is great-why change?until it's not
 - Hard trends disintermediating compliance services
 - Computing power
 - Cloud storage and connectivity
 - Internet accessibility/speed
- = Cloud accounting/globalization/consumer access to advanced technologies
-overall, rate of change (and adoption) is accelerating!



4th Industrial Revolution
-Klaus Schwab (2016)

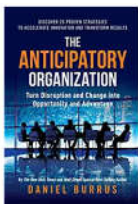
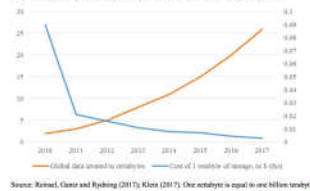
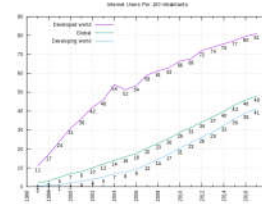


Figure 3: Costs of storage and global data availability, 2009-2017



Source: Reuters, Gartner and Ryskind (2017); Kiron (2017). One terabyte is equal to one billion bytes.



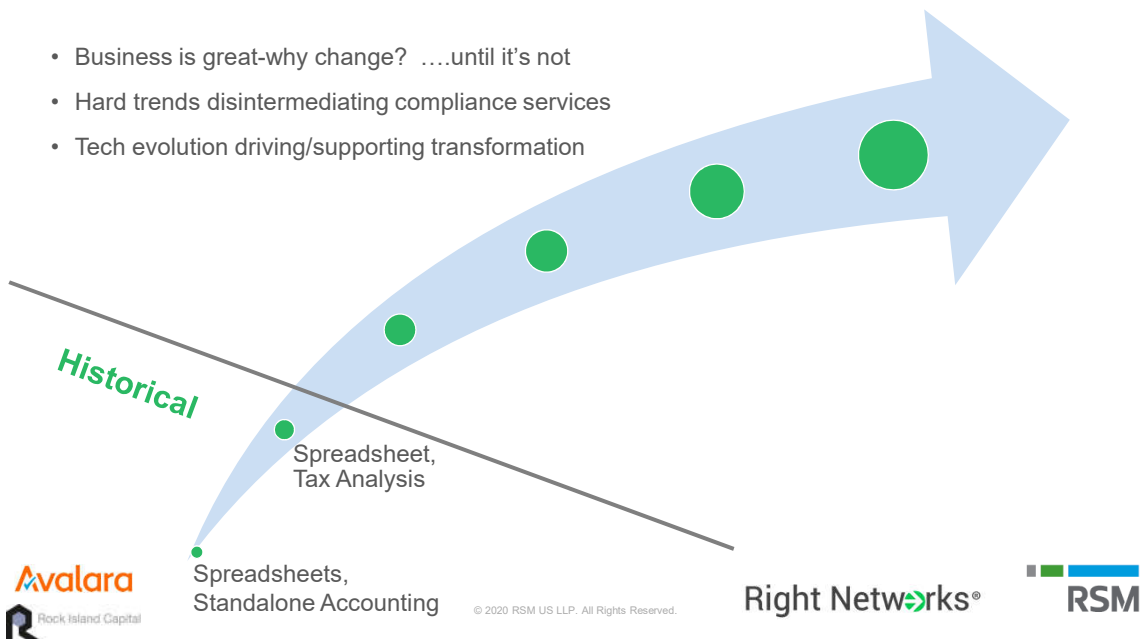
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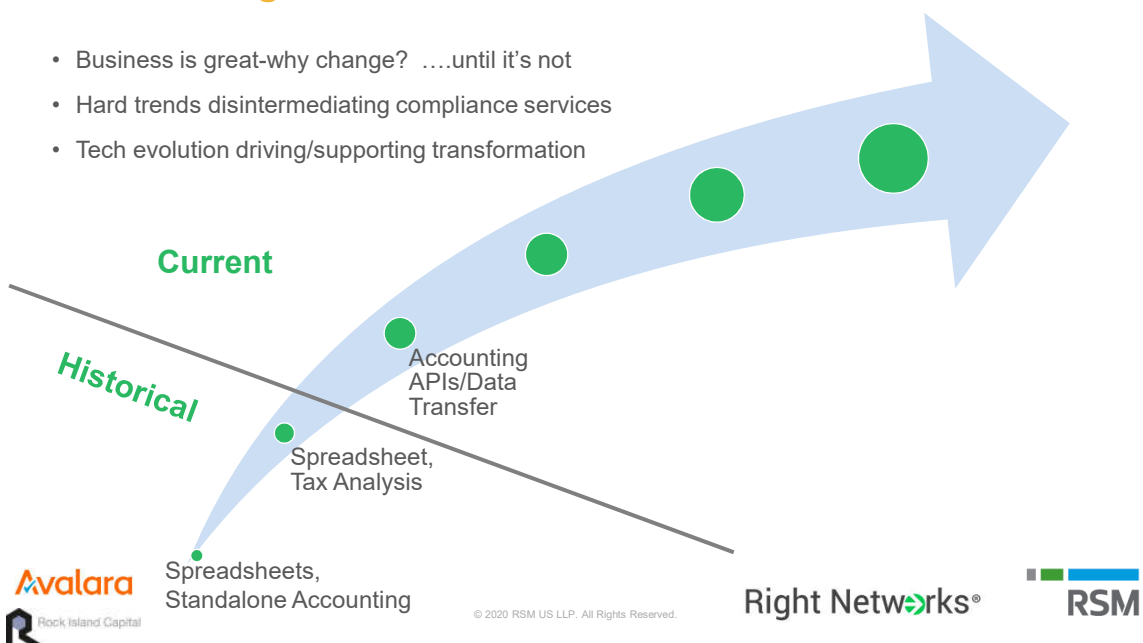
Understanding CAAS Drivers

- Business is great-why change?until it's not
- Hard trends disintermediating compliance services
- Tech evolution driving/supporting transformation



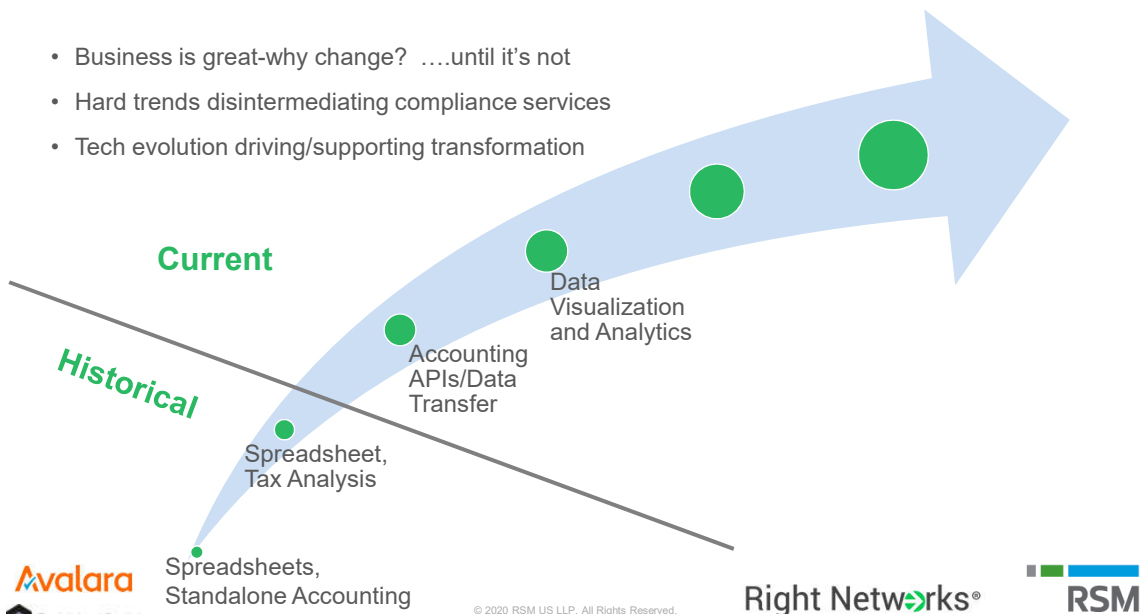
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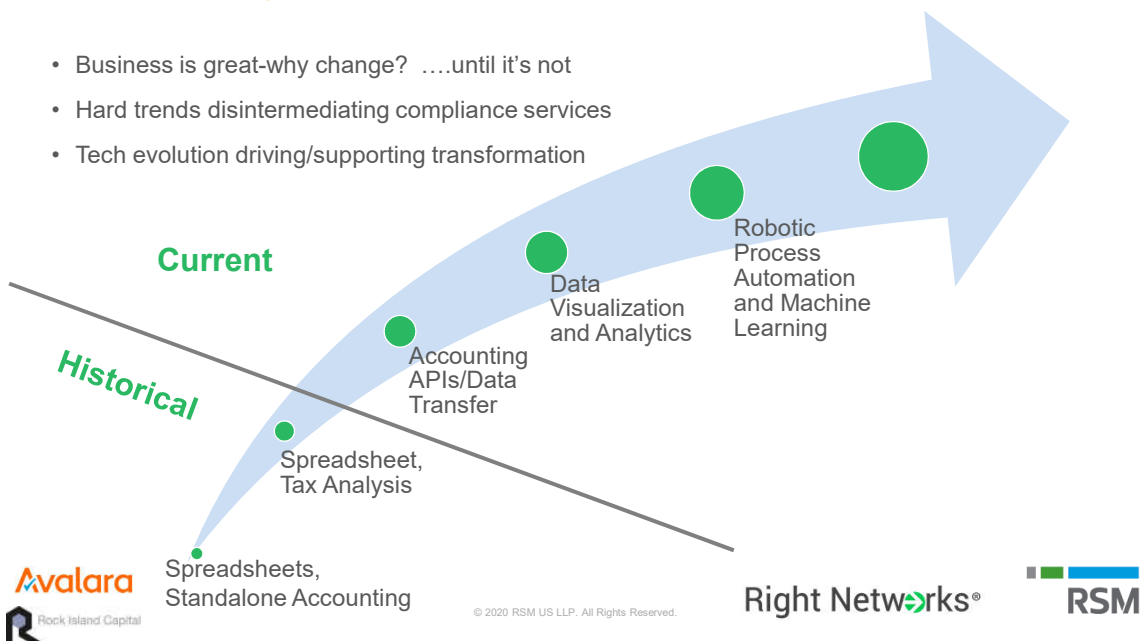
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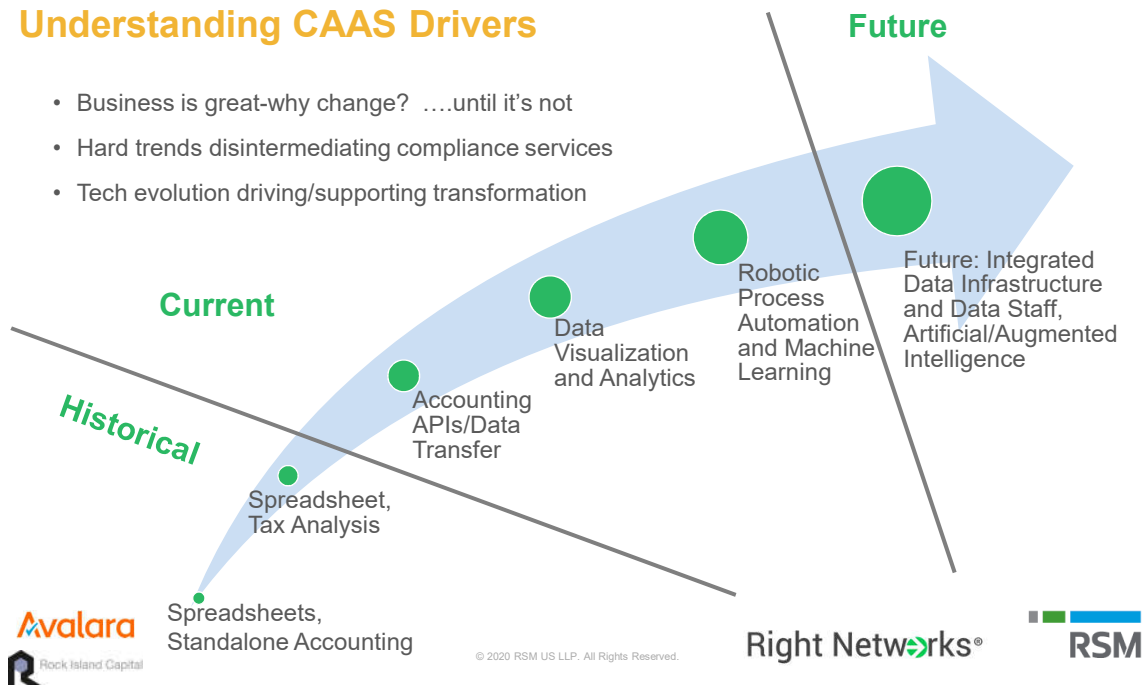
Understanding CAAS Drivers

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Understanding CAAS Drivers

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- Hard trends disintermediating compliance services
- Tech evolution driving/supporting transformation



Understanding CAAS Drivers

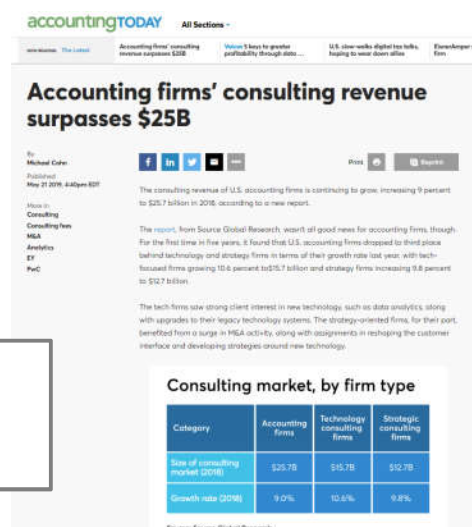
- Business is great-why change?until it's not
- Hard trends disintermediating Compliance Services
- Tech evolution driving/supporting transformation
- Firm growth/profitability trends highlight advisory services

RSM SEPTEMBER 5, 2019

RSM US Revenue Rose to \$2.4 Billion In FY 2019

by JASON BRAMWELL

RSM US Revenue increased 8.1% from 2018
Audit Revenue 36% compared to 37% in 2018
Tax Revenue 35% compared to 36% in 2018
Consulting 27% compared to 26% in 2018



Avalara
Rock Island Capital

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Garnering an Advisory Mindset

- Understand it IS happening (Competition)
 - Automation Factories: Botkeeper, Georges

BOTKEEPER ACCOUNTING PARTNER PACKAGES

Our Accounting Partner Program is priced in two parts: The Accounting Partner Platform, and the services provided to your clients.

Starter Up to \$25K Monthly Expenses	Basic Over \$25K Monthly Expenses	Additional Services: Custom Scoping
\$79 per client / month (billed annually)	\$199 per client / month (billed annually)	CUSTOM per client / month (billed annually)
Includes Cash Basis Whiteup Service	Includes Cash Basis Whiteup Service	Custom Assessment, Designed Around Your Business Mission
Starter package starts at \$79/month and scales up based on total expenses and unique needs.	Basic package starts at \$199/month and scales up based on total expenses and unique needs.	Tailored Key Services (such as manual accounting) To Align With Your Unique Offering
		Additional package starts at a custom pricemonth and scales up based on total expenses and unique needs.

georges Accounting robot • For freelancers • Prices • Sign up • Create an account

The self-employed accounting robot

Georges, an intelligent application and a caring team to automate your accounting.

Your accounting for the year in less than 2 hours

Free try Watch the video demo

10-day trial only. *Without credit card. No obligation.

botkeeper The Future of Bookkeeping

Save 50% or More Compared to Other Solutions

Intuitive, cloud-based and designed for maximum efficiency. A major advantage for the accounting professional, any company needs.

Partners: shopify, woocommerce, cPanel, PayPal, Stripe, Sage 50, QuickBooks, Xero, NetScout, etc.



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Garnering an Advisory Mindset

- Understand it IS happening (competition)
 - Automation Factories: Botkeeper, Georges
 - New Entities: Pilot, Bench, ScaleFactor

An Important Update from ScaleFactor's CEO

SCALEFACTOR

But our growth was not without growing pains and important learnings. The most important of these, which I outlined in our ScaleFactor 2.020 plan, was that technology alone is not enough to make business owners feel financially confident. Customers want a combination of software and human support within an overall solution. Human support wants to be the hero in the customer relationship. Trying to provide both at scale stretched our business in too many directions at once.

help@bench.co | (888) 765-8846 | Start a Free Trial

You run your business. We'll do your bookkeeping.

Get a professional bookkeeper at a price you can afford, and powerful financial reporting with zero learning curve.

Starter	Micro	Boutique	Venture	Corporate
\$139/m	\$159/m	\$179/m	\$219/m	\$299/m
If billed annually \$139/m or if billed monthly	If billed annually \$159/m or if billed monthly	If billed annually \$179/m or if billed monthly	If billed annually \$219/m or if billed monthly	If billed annually \$299/m or if billed monthly
Start Free Trial	Start Free Trial	Start Free Trial	Start Free Trial	Start Free Trial
Monthly expenses below \$5k	Monthly expenses from \$5k to \$7.5k	Monthly expenses from \$7.5k to \$25k	Monthly expenses from \$25k to \$50k	Monthly expenses up to \$50k



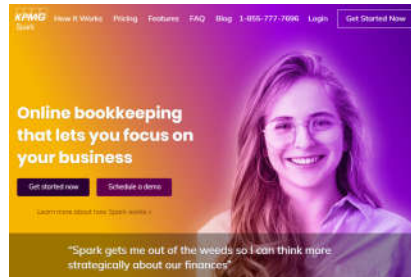
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Garnering an Advisory Mindset

- Understand it IS happening (competition)
 - Automation Factories: Botkeeper, Georges
 - New Entities: Pilot, Bench
 - Big 4: KPMG Spark, Deloitte Private



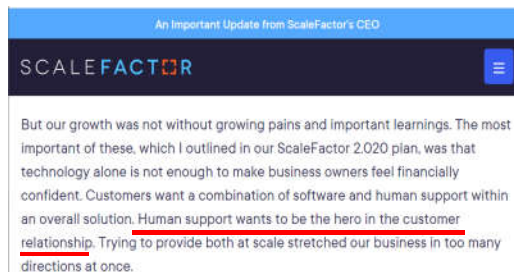

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Garnering an Advisory Mindset

- Understand it IS happening (competition)
- Your starting advantage
 - Already have the client relationship
 - You know they need help, sometimes you just have to ask!
 - You have staff that want to be more advisory



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Garnering an Advisory Mindset

- Understand it IS happening (competition)
- Your starting advantage
- Existing services and expertise
 - Review service codes and revenue
 - Review niche/segment projects
 - Identify expertise



Rock Island Capital

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Garnering an Advisory Mindset

- Understand it IS happening (competition)
- Your starting advantage
- Existing services and expertise
- Identifying client opportunities/market
 - COVID-19: CARES, PPP assistance/loan forgiveness
 - Cash flow projections
 - Local promotion/recovery

Right Networks®

COVID-19 Resource Center

The latest information, tips, and tools to help businesses work safely and effectively.

Right Networks is committed to helping our customers work efficiently and grow their businesses in the cloud. With that in mind, the Right Networks COVID-19 Resource Center provides whitepapers, blog posts, webinars and other relevant resources to help your business adapt during this time of uncertainty and emerge stronger when it's over.



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Garnering an Advisory Mindset

- Understand it IS happening (competition)
- Your starting advantage
- Existing services and expertise
- Identifying client opportunities/market
- Differentiation: Accounting and Advisory
 - Track advisory: work codes
 - Target growth: 10% per year

Client Accounting Services + Client Advisory Services

Seasonal	vs.	Non-Seasonal
Rote Process/Answer	vs.	Ambiguity to Figure Out
Deliver a Report	vs.	Facilitate a Process
Commodity	vs.	Higher Realization
Past Focused	vs.	Future Focused
Historian	vs.	Business Coach
Hourly Billing	vs.	Value Proposition
Required	vs.	Desired
Reactive	vs.	Proactive



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Garnering an Advisory Mindset

- Understand it IS happening (competition)
- Your starting advantage
- Existing services and expertise
- Identifying client opportunities/market
- Differentiation: accounting and advisory
- Cautions about resistive partners/personnel
 - Compensation allocation
 - Close to retirement
 - Silent "coasters"
 - Why would team be resistive:
 - Thoroughly trained on compliance work
 - They want to know answers before discussing with clients
 - Seldom a checklist solution to get to the answer
 - They don't know how to charge for advisory work



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Skilling Up Your Team

- Document existing success
 - Lunch and learns (recorded)
 - Written case studies (PDF)
 - Tool utilization (APIs/RPA/KPIs)*
 - Fire "D" clients to make time available



*API=Application Program Interface
RPA=Robotic Process Automation
KPI=Key Performance Indicators

Right Networks®

Solutions > Software > About > Press & Address > Resources > Application Directory > Contact Us

Success Stories

See how some of our customers are using Right Networks to grow.

Alpha Accounting
Delivering more value

After expanding years of inconsistent performance and customer service from their existing software, Alpha Accounting turned to Right Networks' Alpha Accounting. This gave them a true partner that "has their back" (growing customer base and the steady safety of all their client's future needs).

[Read More](#)

Abdo, Eick, & Meyers
Partners in growth

During a period of impressive growth, this doctor's office was looking for a way to ensure that their patients' experience and the duration of a patient's appointment. When they needed an IT partner that could look towards the future and help them grow, they found it with Right Networks.

[Read More](#)

Signal Solutions
Run and grow your business in the cloud

Just being in the owner of Signal Solutions, an IT services firm that provides software and hardware solutions using CloudBerry Desktop to over 100 clients, Jeff knows what it takes to grow a business. Efficiency of work, not time wasted that built strong customer relationships, and secure data, are what, not just at Signal with Right Networks.

[Read More](#)

Ignite Spot Accounting
Simplifying daily operations

With a mission to help businesses become efficient and profitable, the Ignite Spot Accounting team knew they would need to find a superior cloud-based accounting system that was easy to use and integrate. They turned to Right Networks' Ignite Spot Accounting. Ignite Spot Accounting has the storage capabilities, data integration, and ability to ensure their data, and their clients' businesses, are constantly moving forward.

[Read More](#)

Elliot Davis
Empowering clients

Client Davis was seeking a platform that could deliver the power of a comprehensive digital solution to their clients with the implementation of a single platform. They were looking for a partner that could help them grow their business. They found it with Right Networks. Client Davis was able to deliver excellent customer service more effectively and empower their clients' future success.

[Read More](#)

Rea & Associates
Streamlining client workflows

The Rea & Associates team was looking to support their clients' business growth. They found it with Right Networks. The team was able to streamline their workflow and support their clients' business growth.

[Read More](#)

Simon Lever Business Advisors & CPAs
Reducing the IT burden

Simon Lever Business Advisors and CPAs were looking for a way to reduce their IT burden. They found it with Right Networks. The team was able to reduce their IT burden and support their clients' business growth.

[Read More](#)

PDR CPAs & Advisors
Reducing the IT burden

PDR CPAs & Advisors were looking for a way to reduce their IT burden. They found it with Right Networks. The team was able to reduce their IT burden and support their clients' business growth.

[Read More](#)

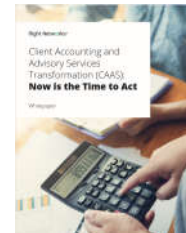
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Skilling Up Your Team

- Document existing success
- Personal reading



Identify where your relationship is today...

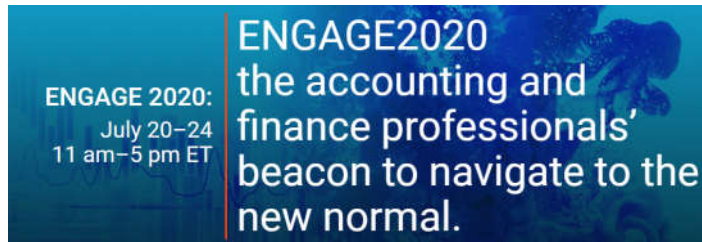


...and then help them get to the next level



Skilling Up Your Team

- Document existing success
- Personal reading
- Conferences/Webinars
 - AICPA Engage
 - Digital CPA (December 8, 2020)
 - CAS Workshop/Badge
 - CPAFMA Accelerator (November 9-11, 2020)



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Skilling Up Your Team

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 - CPAFMA Accelerator (November 9-11, 2020)
 - CPA Consultant's Alliance podcasts



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 - ...Industry Groups



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Skilling Up Your Team

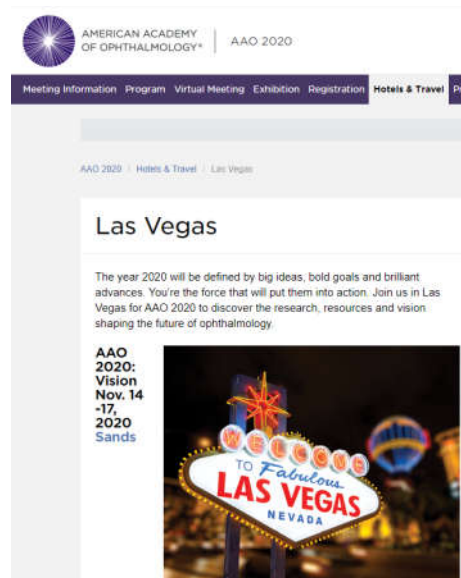
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 - ...Industry Groups



Accounting Services for Optometry Practices



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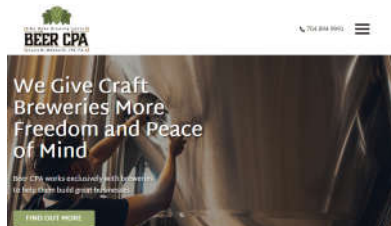


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 - ...Industry Groups



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Conference

Craft Brewers Conference

📅 29 Mar - 01 Apr 2021
📍 San Diego, USA

TRADE SHOW

About BrewExpo America®

BrewExpo America is the largest brewing conference and trade show in the U.S.

BrewExpo America is the premier trade show for craft brewers. With more than 700 vendors all in one location, this is the place to shop for products and services for your brewery or brewpub. This is the perfect opportunity to meet leaders in the national and international brewing arena.

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 - ...Industry Groups



NCIA | Advocating for the Cannabis Industry

Inbox (1) - rkepc...

https://thecannabisindustry...

Register now for NCIA's 6th Annual #CannaBizSummit

the nation's most influential, award-winning cannabis conference & trade show, hosted by the industry's only national trade association, returns to San Jose to celebrate six years of bringing together the industry's best and brightest minds.

REGISTER NOW



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Current Show Information Coming Soon!

September 10-13, 2020
Hershey, Pennsylvania

Groom Expo is the world's largest grooming show, welcoming thousands of pet professionals to the Hershey Lodge and Convention Center in Hershey, Pennsylvania, every September. Groom Expo hosts dozens of educational seminars, exciting grooming competitions, and a weekend packed with extra events to meet and mingle with fellow pet professionals.

2019 Information

2020 Booth Application

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Skilling Up Your Team

- Document existing success
- Personal reading
- Conferences/Webinars/Podcasts
- Specialized training
 - Mentor Plus/Trusted Business Advisor Academy
 - Succession Institute
 - Convergence Coaching
 - Rainmaker Companies
 - Woodard
 - The Growth Partnership
 - Whetstone Group
 - Thomson Reuters
 - Boomer Consulting
 - Upstream Academy
 - Rootworks



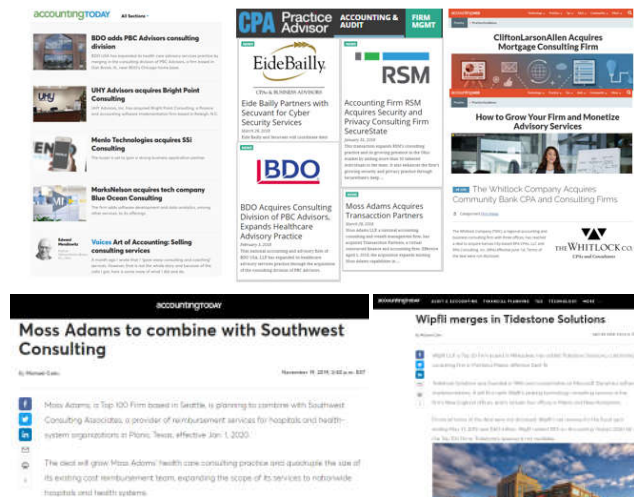
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Skilling Up Your Team

- Document existing success
- Personal reading
- Conferences/Webinars/Podcasts
- Specialized training
- Buy advisory practice/hire “famous person”



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Skilling Up Your Team

- Document existing success
- Personal reading
- Conferences/Webinars/Podcasts
- Specialized training
- Buy advisory practice/hire “famous person”
- Becoming the “famous person”
 - Known as one of top three in your market



“Be one of the top three recognized experts and you will always be invited to propose”

- Bob Bunting
CEO-Moss Adams



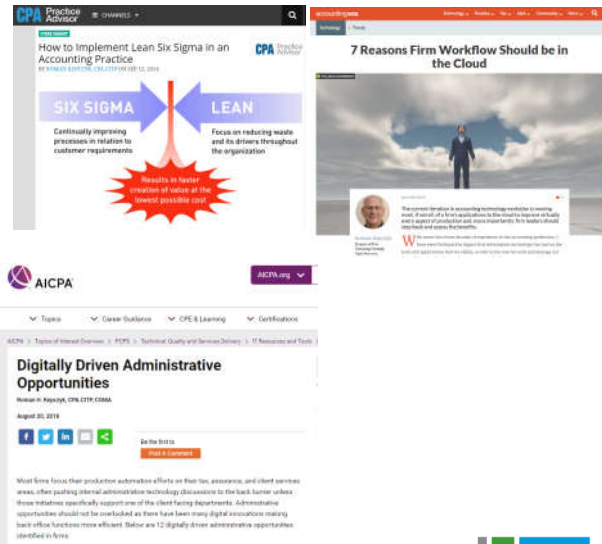
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Skilling Up Your Team

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- Specialized training
- Buy advisory practice/hire “famous person”
- Becoming the “famous person”
 - Known as one of top three in your market
 - Writing



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Skilling Up Your Team

- Document existing success
- Personal reading
- Conferences/Webinars/Podcasts
- Specialized training
- Buy advisory practice/hire “famous person”
- Becoming the “famous person”
 - Known as one of top three in your market
 - Writing/surveying



2020 CPAFMA Information Technology Survey Findings

Published January 20, 2020 By Roman H. Kepczyk, CPA, CITP, PAFM

The CPA Firm Management Association (CPAFMA) recently conducted its third comprehensive technology survey tailored specifically to member firms with the goal of identifying the applications, products and processes utilized by peers. Where possible, the survey attempted to identify which applications firms are moving to in the cloud compared to traditionally on-premise managed solutions. The survey was conducted in December 2019 to determine what information technology firms would be utilizing in 2020 and compared to the results from previous surveys where appropriate. This survey further highlighted the unique nature of CPAFMA member firms which tend to be medium and larger sized firms. 178 CPAFMA members participated, 89% of which had 10 or more personnel, and more than half (53%) were multi-office. The findings of the survey are summarized below and were presented by CPAFMA Advisory Board Member Roman Kepczyk via MAPcast on Friday, December 19, 2019 which is available on the CPAFMA.org website.



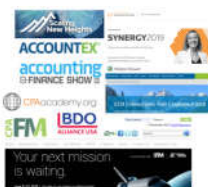
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- Specialized training
- Buy advisory practice/hire “famous person”
- Becoming the “famous person”
 - Known as one of top three in your market
 - Writing/surveying
 - Speaking/webinars



“Replace your dot matrix printer with a laser printer”

#1 AICPA Top Ten Technologies



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- Conferences/Webinars/Podcasts
- Specialized training
- Buy advisory practice/hire “famous person”
- Becoming the “famous person”
 - Known as one of top three in your market
 - Writing/surveying
 - Speaking/webinars
 - Advising clients
 - “Produce” Services: FPO, STO, LTO/LAO
 - Leverage “Repeatable” Engagements



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Advising Upon the Tech Stack

- Moving CAS to CAAS with business information



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Advising Upon the Tech Stack

- Moving CAS to CAAS with business information
- CAAS evolution built around technology



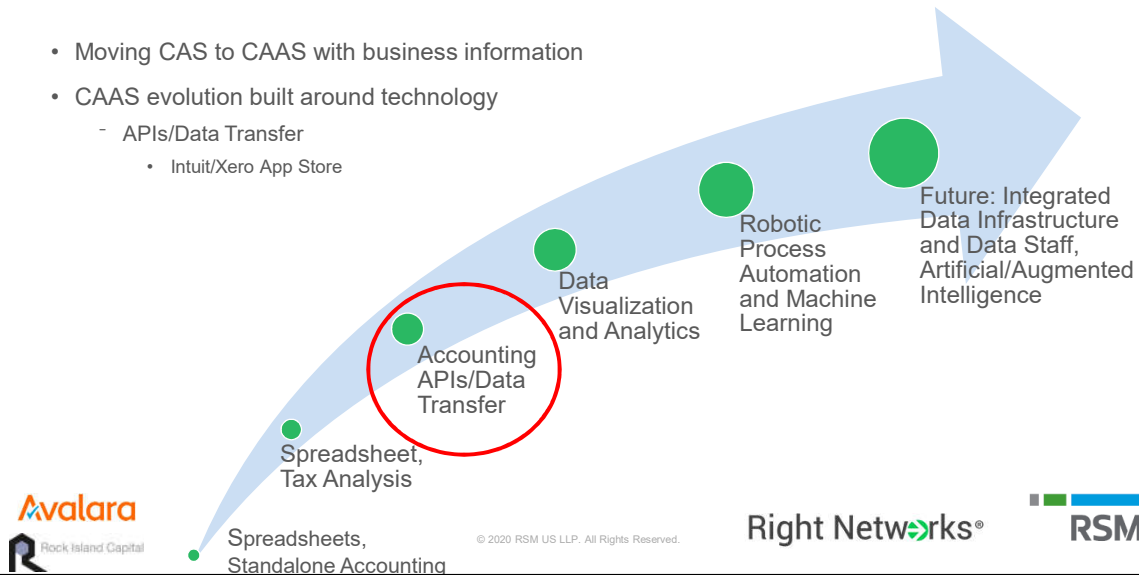
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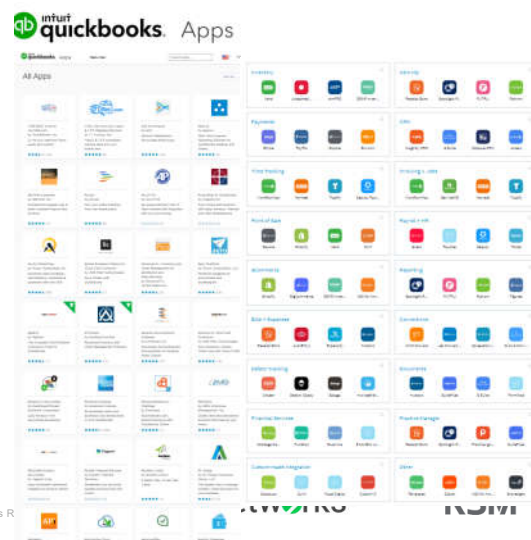
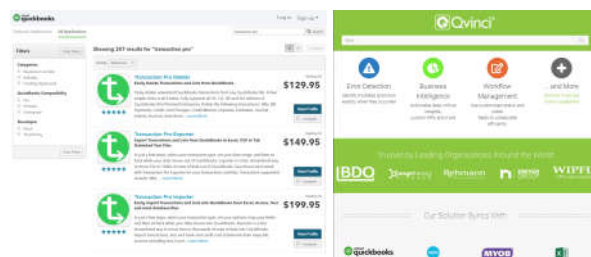
Advising Upon the Tech Stack

- Moving CAS to CAAS with business information
- CAAS evolution built around technology
 - APIs/Data Transfer
 - Intuit/Xero App Store



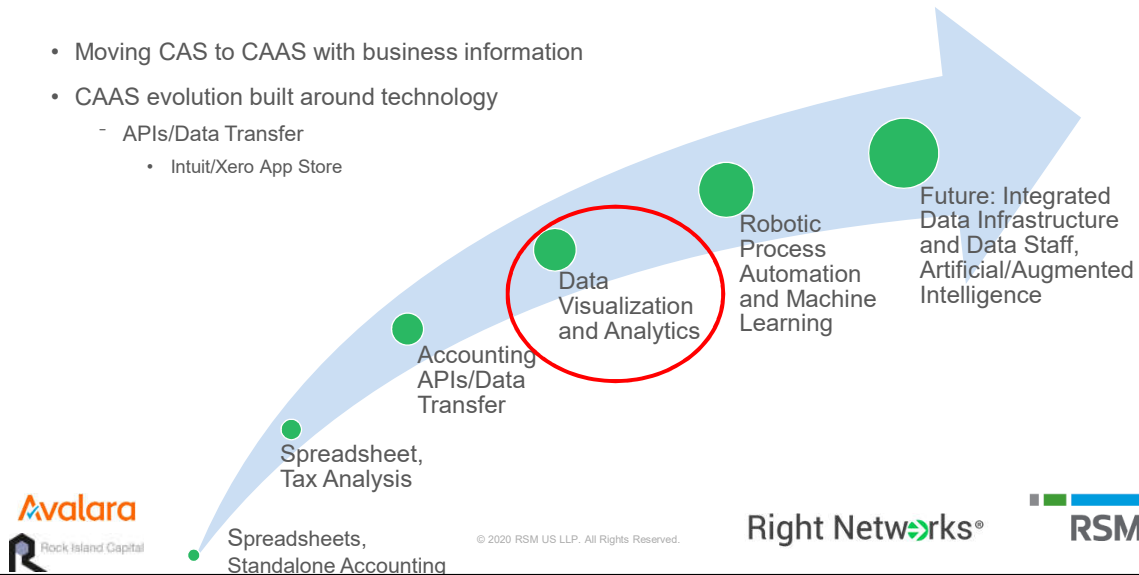
Advising Upon the Tech Stack

- Moving CAS to CAAS with business information
- CAAS evolution built around technology
 - APIs/Data Transfer
 - Intuit/Xero App Store
 - APIs: Application Program Interface
 - Data Transfer/Reporting



Advising Upon the Tech Stack

- Moving CAS to CAAS with business information
- CAAS evolution built around technology
 - APIs/Data Transfer
 - Intuit/Xero App Store



Advising Upon the Tech Stack

- Moving CAS to CAAS with business information
- CAAS evolution built around technology
 - APIs/Data Transfer
 - Data Visualization
 - Tableau
 - Domo
 - Microsoft Power BI



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Advising Upon the Tech Stack

- Moving CAS to CAAS with business information
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 - APIs/Data Transfer
 - Data Visualization
 - RPA/Machine Learning
 - Automation Anywhere
 - UiPath
 - Blue Prism
 - AutoFy



Spreadsheets,
Standalone Accounting

Accounting
APIs/Data
Transfer

Spreadsheet,
Tax Analysis

Data
Visualization
and Analytics

Robotic
Process
Automation
and Machine
Learning

Future: Integrated
Data Infrastructure
and Data Staff,
Artificial/Augmented
Intelligence

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 - Blue Prism
 - AutoFy

Sync Scheduler

Enabled: ☒ Sync every: 1 Hour From: 10:00 AM To: 12:00 PM every: Weekly

Notifications

E-mail: ☐ Send base notifications to your admin, and:

E-mail Address:

E-mail Address:

Save Cancel

autofy SALESFORCE | CLICKDOCKS ONLINE

Dashboard Connections Visualize Salesforce/QuickBooks Add New Workflow Status Center

1 Workflow Widgets SP connector **Specializations** **events**

Configuration Tools **Trigger** **Process**

Get: Opportunity created or modified since 4/22/2019 9:47:06 AM

When: Daytime Equal Closed Won

Preferences: ☒ Don't insert records if related data isn't found (Strict Mode)

Insert To:

2 Specializations **customers** **Workflow Widgets SP connector**

Configuration Tools **Trigger** **Process**

Get: Customer created or modified since 4/22/2019 9:47:16 AM

When: Active Equal True

Preferences: ☒ Only update records

Insert To:

3 Specializations **new** **Workflow Widgets SP connector**

Configuration Tools **Trigger** **Process**

Get: Item created or modified since 4/22/2019 9:48:47 AM

When: Active Equal True

Preferences: ☒ Only update records

Insert To:



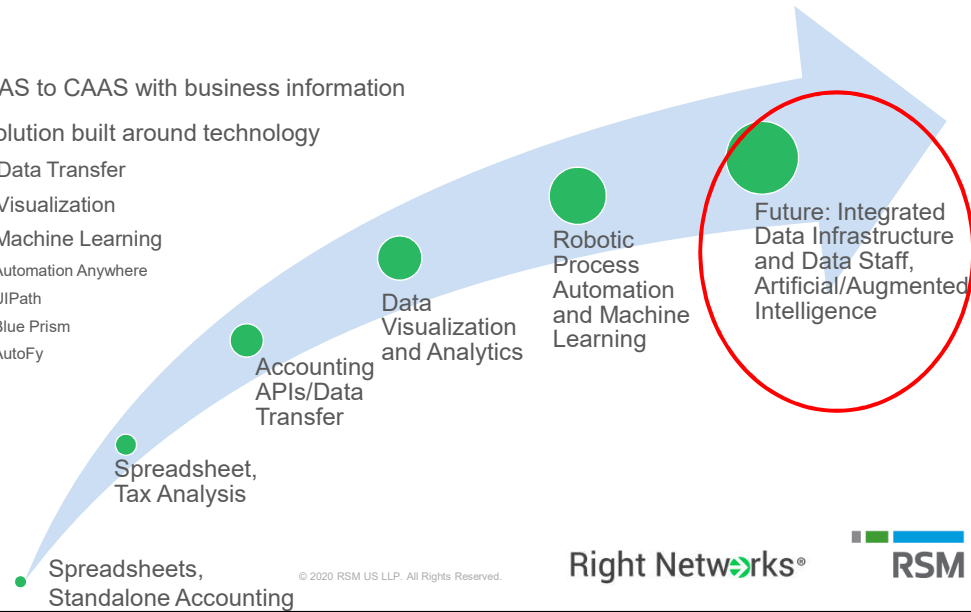
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Advising Upon the Tech Stack

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Rock Island Capital

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Advising Upon the Tech Stack

- Moving CAS to CAAS with business information
- CAAS evolution built around technology
- Process evolution built around accounting product



CAAS Cloud Tech Stack



Rock Island Capital

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Agenda



Let Right Networks help you
optimize your tech stack today:

603-324-8390

CAAS Playbook

- CAS + CAS = CAAS
- Understanding CAAS Drivers
- Garnering an Advisory Mindset
- Skilling Up Your Team
- Advising Upon the Tech Stack
- Resources:

<https://info.rightnetworks.com/caas-now-is-the-time-to-act-lp>

<https://info.rightnetworks.com/caas-tailoring-tech-stack-lp>

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About Right Networks

Hosted/Technology:



- **100% accounting focused**
- Deep industry experience and knowledge required to provide **best-in-class cloud solutions**.
- Lead the market with **180,000 users**.
- **5,000+ accounting firms** trust us to deliver their applications in the cloud every day.
- Strategic partnerships with **Intuit, CCH-Wolters Kluwer, Thomson Reuters**, and others at the executive, technology, and support levels that are unmatched in the industry.
- Uniquely positioned to deliver the **best solution and service experience**.
- Right Networks Cloud Premier (formerly Xcentric)

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